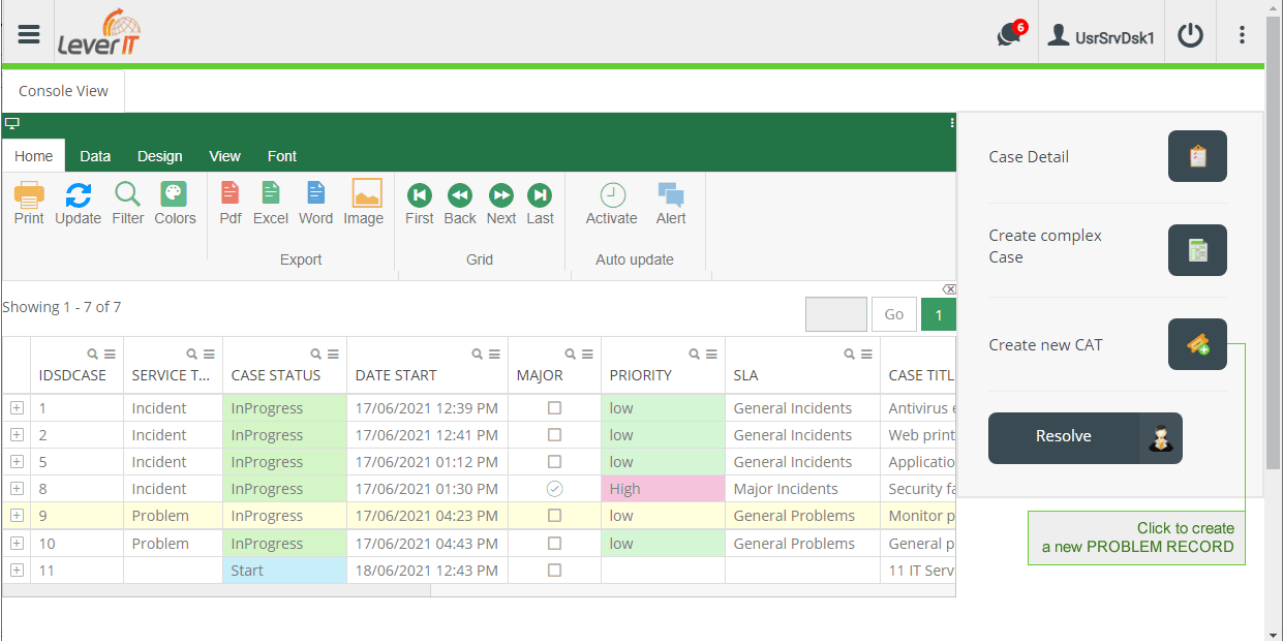


How to create a new problem record

1. Log into IthelpCenter portal. In the main menu select *Case Management > Console*



The screenshot shows the IthelpCenter Console interface. At the top, there is a navigation bar with the LeverIT logo and user information (UsrSrvDsk1). Below the navigation bar, there is a 'Console View' section with a menu (Home, Data, Design, View, Font) and a toolbar with various icons for actions like Print, Update, Filter, Colors, Export, Grid, and Auto update. The main area displays a table of cases with columns for IDSDCASE, SERVICE T..., CASE STATUS, DATE START, MAJOR, PRIORITY, SLA, and CASE TITL. The table shows 7 cases, with the first 8 rows visible. Case 9 is highlighted in yellow. On the right side, there is a sidebar with buttons for 'Case Detail', 'Create complex Case', 'Create new CAT', and 'Resolve'. A green callout box points to the 'Create new CAT' button with the text 'Click to create a new PROBLEM RECORD'.

IDSDCASE	SERVICE T...	CASE STATUS	DATE START	MAJOR	PRIORITY	SLA	CASE TITL
1	Incident	InProgress	17/06/2021 12:39 PM	<input type="checkbox"/>	low	General Incidents	Antivirus e
2	Incident	InProgress	17/06/2021 12:41 PM	<input type="checkbox"/>	low	General Incidents	Web print
5	Incident	InProgress	17/06/2021 01:12 PM	<input type="checkbox"/>	low	General Incidents	Applicatio
8	Incident	InProgress	17/06/2021 01:30 PM	<input checked="" type="checkbox"/>	High	Major Incidents	Security fe
9	Problem	InProgress	17/06/2021 04:23 PM	<input type="checkbox"/>	low	General Problems	Monitor p
10	Problem	InProgress	17/06/2021 04:43 PM	<input type="checkbox"/>	low	General Problems	General p
11		Start	18/06/2021 12:43 PM	<input type="checkbox"/>			11 IT Serv

2. In the *console tool panel*, on the right side of the screen, click on the button **Create new CAT**, the following case form will open:

1
Select an User
 a. Click on the **Change** button, a search window will open, enter a search criteria (first name, last name, employee number, etc.) or select directly from the full list of users.
 b. Once the user record is selected, click on the **Use Selected Record** button.

3
Select Urgency
 Select a value from the drop-down list

5
 With the SLA, the **Impact** will also be selected. The **Priority** is automatically calculated based on **Urgency and Impact**.
Note:
 The impact and priority can be changed in the the corresponding drop-down list fields.

6
 Complete the case **Title (subject)** and **Description (More detailed information)**.
 These fields can be auto completed by checking the boxes next to each field.
 To attach files to the case, use the Attach File tool. See [Case Creation Tools](#)

Complete the following form

Case number: 10

Select user:

(Usr 001) Jordan Ford Franklin

Notification Method:

eMail (lever.Test@)

Urgency:

Is major: *Enable when the case is major*

Select Category

Category: IT Service\Hardware Support

Details: Hardware problem

Id	MD	SLA	SLA name	Model	Calendar	Max time	Normal time	Model Description
3			General Problems	General Pro...	Default	2880	720	The main objecti...

Description

Impact: **Priority:**

Title: Devices issues

Description: Keyboard isn't working and monitor does not turn on

2
Notification Method
 Depending on the selected user, the notification method assigned to the user will be preselected (Mail, Phone or Mobile)
 If the user has no notification method, click on the **Add** button to create one.
 If enabled, mail notifications for case-related events will be automatically sent to the user

4
Select category
 a. Click on the **Change** button, the search window will open for selection of the services available in the catalog.
 b. Ways to search in the catalog: Select from the drop-down fields **by Category** or click on the button: **Normal Search**, in the text field enter a keyword or phrase. *In this mode the **Exact Phrase** checkbox filters the matches found.

c. Click on the **Select** button next to the category that most accurately describes the issue.

According to the category selection from the service catalog, the **SLA and the service model** will be automatically preselected.
Notes:
 When there is more than one result, the SLA can be selected in the grid.
 If there are Workarounds associated to the selected category(ies), a link will appear to consult them.

Category selection, search modes:

1. With the **CATEGORY SEARCH** mode, select in the drop-down field(s) the categories, according to the **PROBLEM**

Select category: ✕

Normal search
Click to switch to Normal search mode

Select category

Category 1: IT Service

Category 2: Hardware Support

Category	Category Detail	Path	Knowledge	Action
Incident	Keyboard, mouse or other dev...	IT Service\Hardware Support	0 Self Help:	Select
Incident	Monitor issues	IT Service\Hardware Support	0 Self Help:	Select
Incident	Desktop or laptop issues	IT Service\Hardware Support	0 Self Help:	Select
Problem	Hardware problem	IT Service\Hardware Support	0 Self Help:	Select
Request	Hardware request	IT Service\Hardware Support	0 Self Help:	Select

1 >

2. When using the **NORMAL SEARCH** mode, enter at least 3 letters of the keyword to be searched for matches in the catalog.

Select category: ✕

Search category

Enter words or phrases that best describe the software or application

Enter at least 3 characters to search for coincidences

Hardware pro

Exact Phrase

Category	Category Detail	Path	Knowledge	Action
Problem	Hardware problem	IT Service\Hardware Support	0 Self Help:	Select

After selection, the SLA and service model will be automatically calculated:

Select Category

Category: IT Service\Hardware Support Change

Details: Hardware problem

Id MD SLA	SLA name	Model	Calendar	Max time	Normal time	Model Description
3	General Problems	General Problem	Default	2880	720	The main objective is to ...

Description

Impact: Low Priority: low

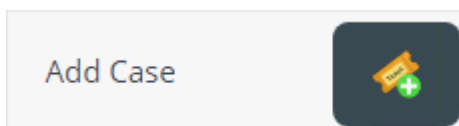
3. **Optional: Additional forms**

Besides the case form, additional forms and fields can be configured according to the model type. When enabled, these forms will be displayed after the model automatic calculation while filling the main case form.

Forms may include:








- **One or more fields of type:**
Text, numeric, decimal, Date/time selectors, checkboxes.
- **Drop-down fields and buttons to validate information.**
- **Mandatory or optional fields.**
- **New, save and delete buttons:**
Allows to include more than one record per form, which relate to the same case.

4. Once the case creation form has been filled out, click on the **Add case** button located on the [case creation tool panel](#).



Case Creation Tools

After clicking on Create New CAT button the case creation form will open and the following tools will be available also:

		<p>Template: See How to use template tool x</p>
		<p>CI Affected: Allows to add/delete/edit CIs related to the case. See How to use CI affected tool x</p>
Template		<p>Attach file: Allows to add/edit/delete files to the case. There is no restriction on the file type and the maximum file size allowed is 10Mb. See How to use attach file tool x</p>
CI Affected		
Attach File		<p>Link case: Allows to add/edit/delete case relations to the current case.¹⁾ See How to use link tool x</p>
Link Case		
Cancel Case		<p>Cancel case: Stops case creation, once this button is clicked a dialog box will appear to confirm the cancellation of the case, if confirmed, a popup window will appear informing that the case has been cancelled.</p>
Save draft and exit		<p>Save draft an exit: Saves the entered case information and closes the case creation form, without deleting or canceling it.</p>
Add Case		<p><i>Note that:</i> The case is not fully created yet and its initial status will be Start To complete case creation, select the record in the grid and double click on it to reopen the form. The status of the case after its creation will be InProgress</p>
<input type="checkbox"/> Keep Resolving		
		<p>Add case: Allows the creation of the case after completing the information of the basic form and additional forms²⁾.</p>
		<p>Keep Resolving: When this option is checked, the case attention window opens immediately after its creation only if the advisor is the case owner. When the advisor is a case handler, must select it in the grid of assigned cases to start attention.</p>

1)

Case to which relations with other cases are added

2)

In case they are enabled and have mandatory fields

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